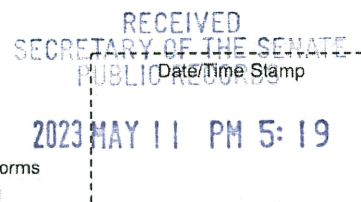


## RE-2 Employee Post Travel Disclosure of Travel Expenses

**Post Travel Filing Instructions:** Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building. **This form is a public disclosure. The form and all attachments will be made publicly available.**



**Certification:** In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:

**Private Sponsor(s):**

Postsecondary National Policy Institute

**Travel Dates:**

04/11/2023 to 04/12/2023

**Name of accompanying family member (if any):****Relationship to Traveler:**

### Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$109.00	\$98.00	\$79.00	\$238.00

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final **Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

5/11/23  
Date

Viviann Anguiano  
Printed Name of Traveler

Signature of Traveler

### TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

5/11/2023  
Date

Signature of Supervising Senator/Officer

## ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

**Note:** Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☐ Yes ☒ No

Expense Change	Revised Amount	Explanation
There were no changes to pre-approved travel expenses.		

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

**Explanation:** There were no changes to the pre-approved itinerary.

Were there any additional changes to the pre-approved trip?

☐ Yes ☒ No

**Explanation:** There were no additional changes to the pre-approved trip.



# Postsecondary National Policy Institute (PNPI): PNPI's Debt & Repayment Seminar



Viviann Anguiano

**Title:**

None

**Employing Office/Committee:**

HEALTH, EDUC, LAB, AND PENSIONS -  
DEM

**Duty Station:**

WASHINGTON, DC

**Destination(s):**

Warrenton, Virginia

**Explain how this trip is specifically connected to the traveler's official or representational duties:**

This trip is directly tied to the issue portfolio of higher education staff. The agenda will cover federal student loan debt and repayment issues, including delinquency and default, borrower perspectives on debt and default, discussions with experts, overview of loan repayment plans, dive into public service loan forgiveness.

**Name of accompanying family member (if any):**

Not Entered

**Name and Relationship to Traveler:**

None

## Organization Information

**Organization Name**

Postsecondary National Policy Institute (PNPI)

**§501(c)(3) Organization Type**

Public Charity

**Address 2 (Optional)**

Public Charity

**Phone Number**

2024073172

**Is your organization classified as a §501(c)(3)?**

☒ Yes

☐ No

**Address**

1828 L Street NW

**City, State Zip**

Washington, District Of Columbia 20036 United States

**Organization URL**

[pnpi.org](http://pnpi.org)

## History of Congressional Travel

Since 2012, PNPI has sponsored twenty-three congressional staff seminars on postsecondary topics including federal student aid, higher education accreditation, student data, and competency-based education.

## Educational Activities

In addition to multi-day seminars, PNPI sponsors Hill-based briefings for larger Hill audiences and is available to all congressional staff for postsecondary-related research support. PNPI also offers briefings, trainings, and boot camps to prospective policymakers and postsecondary policy leaders.

## Lobbyist and Foreign Agent Registration Information

**Lobbyist Registration Status:** *I certify that the sponsor is not a federally registered lobbyist and do not retain or employ a federally registered lobbyist.*

**Foreign Agent Registration Status:** *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

## Foreign Government Involvement

### Foreign Agent Registration Status:

- ☒ I certify that the sponsor is not a foreign government.
- ☒ I certify that the sponsor is not an entity that is owned or operated by a foreign government.
- ☒ I certify that the sponsor does not receive funding from a foreign government.

### Comments

None Entered

## Signature Page

The signature page is below.

## Purpose and Details

### Provide a brief description of the trip.

This trip is designed to increase participants' understanding of federal student debt and federal student loan repayment.

### Explain how the purpose of the trip relates to your organization's mission.

PNPI provides professional development to current and prospective policymakers who work on higher education issues. This event is designed to increase congressional staff's knowledge of federal student loan debt and repayment. A detailed agenda is attached.

### Is your organization the only sponsor for this trip?

☒ Yes ☐ No

### Grantmaking Organizations (Optional)

1. The Bill and Melinda Gates Foundation
2. The Kresge Foundation

### With or Without Regard for Congressional Participation

The trip is arranged or organized specifically with regard to congressional participation.

### Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

### Lobbyist/Foreign Agent Financing

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

### Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations

Complete if any of the sponsors is not a §501(c)(3) organizations.

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
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### Certification of No Recreational Activity and No Alcohol

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

### Invitees

**i** Members and staff from the House of Representatives **will** receive invitations.

The list of invitees is below.

### Travel Details

**Trip Start Date/Time:**  
04/11/2023 @ 09:00 AM



**Trip End Date/Time:**  
04/12/2023 @ 05:00 PM

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

☐ Yes ☒ No

### Itinerary

The itinerary is below.

**Transportation** (Per Member/Officer/Employee: \$109.00 | Accompanying Family Member: \$0.00)

Transportation Type	Class	Amount
Other	Coach	\$109.00
<b>Note</b> This cost is for round trip on a shuttle bus.		

**Lodging** (Per Member/Officer/Employee: \$98.00 )

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
04/11/2023	04/12/2023	Airlie Conference Center	Warrenton	Virginia	United States	1	\$98.00	No

**Meals** (Per Member/Officer/Employee: \$79.00 )

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
04/11/2023	\$0.00	\$15.00	\$26.00	\$5.00	<b>\$46.00</b>	Warrenton	Virginia	United States	No
04/12/2023	\$13.00	\$15.00	\$0.00	\$5.00	<b>\$33.00</b>	Warrenton	Virginia	United States	No

**Reasonable Miscellaneous Expenses** (Per Member/Officer/Employee: \$238.00 )

Expense Type	Amount	Notes
Conference Fees	\$238.00	Meeting space/AV/WiFi

**Additional Attachments** All additional attachments are below.

Document Name
Revised Itinerary

DocuSign Envelope ID: 70E9BDF1-A187-46BF-84A7-DBAD66475773

## PRIVATELY SPONSORED TRAVEL

## SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: PNPI's Debt & Repayment Seminar

Travel Date(s): April 11- April 12, 2023

Travel Destination(s): Warrenton, VA

Sponsor: Postsecondary National Policy Institute (PNPI)

MaryEllen McGuire  
(printed name of sponsor representative)

President and Founder  
(title)

DocuSigned by:  
MaryEllen McGuire  
4E6B30068EBF41E...  
(signature of sponsor representative)

2/27/2023  
(date)

DocuSign Envelope ID: EC05CB48-FE41-4469-9806-F0CBD39956FE

## Grantmaking Organization Certification Form

**Instructions:** If a sponsor receives funds from a grantmaking organization, the sponsor must disclose this on the *Private Sponsor Travel Certification Form*, and the grantmaking organization must complete the *Grantmaking Organization Certification Form*. The completed *Grantmaking Organization Certification Form* must be submitted to the Senate Select Committee on Ethics by the trip sponsor at least 30 days prior to the travel departure date.

Grantmaking Organization: The Bill and Melinda Gates Foundation

Private Sponsor: The Postsecondary National Policy Institute

Trip Name: PNPI's Debt & Repayment Seminar

Travel Date(s): April 11- April 12, 2023

Destination(s): Warrenton, VA

In compliance with the *Regulations Governing Privately Sponsored Travel*, I certify the following:

- ☒ The grantmaking organization is a § 501(c)(3) organization.
- ☒ The grantmaking organization is not a lobbyist, lobbying firm, or foreign agent, nor an entity that retains or employs a lobbyist or foreign agent.
- ☒ The grantmaking organization provides funds under an established grant program, or in a manner that is otherwise consistent with the mission and practices of the organization.
- ☒ The grantmaking organization is not involved, directly or indirectly, in organizing and conducting the trip. This includes selecting participants for a trip.
- ☒ The grantmaking organization does not directly pay or reimburse travel expenses for any Senate Member, officer, or employee.

Kathryn Young

Senior Program Officer

(Printed name of grantmaking organization representative)

(Title)

DocuSigned by:

Kathryn Young

724D86038FA044D...

(Signature of grantmaking organization representative)

2/17/2023

(Date)

DocuSign Envelope ID: CFE30591-B466-4BF8-A4EF-51763AE92AB1

## Grantmaking Organization Certification Form

**Instructions:** If a sponsor receives funds from a grantmaking organization, the sponsor must disclose this on the *Private Sponsor Travel Certification Form*, and the grantmaking organization must complete the *Grantmaking Organization Certification Form*. The completed *Grantmaking Organization Certification Form* must be submitted to the Senate Select Committee on Ethics by the trip sponsor at least 30 days prior to the travel departure date.

Grantmaking Organization: The Kresge Foundation

Private Sponsor: The Postsecondary National Policy Institute

Trip Name: PNPI's Debt & Repayment Seminar

Travel Date(s): April 11- April 12, 2023

Destination(s): Warrenton, VA

In compliance with the *Regulations Governing Privately Sponsored Travel*, I certify the following:

- ☒ The grantmaking organization is a § 501(c)(3) organization.
- ☒ The grantmaking organization is not a lobbyist, lobbying firm, or foreign agent, nor an entity that retains or employs a lobbyist or foreign agent.
- ☒ The grantmaking organization provides funds under an established grant program, or in a manner that is otherwise consistent with the mission and practices of the organization.
- ☒ The grantmaking organization is not involved, directly or indirectly, in organizing and conducting the trip. This includes selecting participants for a trip.
- ☒ The grantmaking organization does not directly pay or reimburse travel expenses for any Senate Member, officer, or employee.

Caroline Altman Smith

Deputy Director, Education

*(Printed name of grantmaking organization representative)*

*(Title)*

DocuSigned by:

*Caroline Altman Smith*

2/9/2023

F7A7C459DAB74E6...

*(Signature of grantmaking organization representative)*

*(Date)*

**ATTACHMENT:**  
**Senate Private Sponsor Travel Certification Form**

**Name and title of Senate invitees:**

**Viviann Anguiano**  
**Senior Policy Advisor**  
Senator Sanders (I-VT)  
Senate Committee on Health,  
Education, Labor and Pensions  
[Viviann\\_Anguiano@help.senate.gov](mailto:Viviann_Anguiano@help.senate.gov)

**Jessica Cardichon**  
**Education Policy Director**  
Senator Sanders (I-VT)  
Senate Committee on Health,  
Education, Labor and Pensions  
[jessica\\_cardichon@help.senate.gov](mailto:jessica_cardichon@help.senate.gov)

**Ramon Carranza**  
**Legislative Assistant**  
Senator Schumer (D-NY)  
[Ramon\\_Carranza@schumer.senate.gov](mailto:Ramon_Carranza@schumer.senate.gov)

**Patrick Fox**  
**Education Policy Advisor**  
Senator Cassidy (R-LA)  
Senate Committee on Health,  
Education, Labor and Pensions  
[Patrick\\_fox@help.senate.gov](mailto:Patrick_fox@help.senate.gov)

**Emily McBride**  
**Legislative Assistant**  
Senator Tuberville (R-AL)  
[Emily\\_mcbride@tuberville.senate.gov](mailto:Emily_mcbride@tuberville.senate.gov)

**Alanna Purdy Montesinos**  
**Legislative Assistant**  
Senator Lujan (D-NM)  
[Alanna\\_PurdyMontesinos@lujan.senate.gov](mailto:Alanna_PurdyMontesinos@lujan.senate.gov)

**Lauren Schwensen**  
**Education Policy Advisor**  
Senator Cassidy (R-LA)  
Senate Committee on Health,  
Education, Labor and Pensions  
[Lauren\\_Schwensen@help.senate.gov](mailto:Lauren_Schwensen@help.senate.gov)

All staff were invited due to their employment with the Senate HELP Committee, Senate Appropriations Committee, or with a Member who sits on the Senate HELP committee or Senate Appropriations Committee.



February 28, 2023

Dear Viviann,

We are writing to invite you to participate in the Postsecondary National Policy Institute's (PNPI) Debt and Repayment Seminar on April 11 and 12, 2023, in Warrenton, VA at Airle Conference Center. This seminar is designed to deepen your understanding of federal student loan debt and repayment. Included with this invitation are the forms necessary for ethics rules compliance. **By Sunday, March 12, 2023, you must submit these included forms and documents directly to the Ethics Committee in Hart 220. They are:**

- A copy of this PNPI invitation;
- A completed Private Sponsor Travel Certification Form with all attachments, including a Senate invitee list;
- An itinerary and agenda; and
- A completed and signed Employee Pre-Travel Authorization Form.

After receiving the completed travel package, the Ethics Committee will review it and issue an approval for travel to you or your sponsoring Member. The Ethics Committee advises all Senate employees to maintain copies of all submitted forms for their own records. After the seminar, we will provide you with a post-travel form that you will need to complete and submit. If you do not submit the required paperwork by the Committee's deadline of March 12, you will not have the option to participate. **Paperwork submitted to the Ethics Committee after the deadline will not be considered.**

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations. No government, individual, foreign, corporate or special interest money is accepted. The foundations supporting PNPI are the Bill and Melinda Gates Foundation and the Kresge Foundation. No funding has been earmarked for this specific trip by any of PNPI's funders. PNPI is the sole sponsor, planner, and executor of the trip. PNPI maintains autonomy over the agenda, invitations, and event materials.

We will depart for the seminar at 9:00am on Tuesday, April 11 from Peace Circle at Pennsylvania Avenue and First Street NW in Washington, D.C. The program will begin at Airle at 10:30am and will conclude on Wednesday, April 12 at 5:00pm. If you have any questions about the seminar, please do not hesitate to email or call us directly.

PNPI's Debt and Repayment Seminar promises to be both educational and productive. We look forward to your participation!

Sincerely,  
*MaryEllen McGuire*

MaryEllen McGuire, President  
Postsecondary National Policy Institute (PNPI)  
[mcguire@pnpi.org](mailto:mcguire@pnpi.org)/202-407-3172



**Federal Student Loan Debt & Repayment  
Seminar  
April 11-12, 2023  
Warrenton, Virginia**

**Tuesday, April 11**

8:45am                    **Staff arrive to board shuttle**  
Peace Circle  
Pennsylvania Ave and First Street NW, Washington, D.C.

9:00am                    **Depart Peace Circle**

10:15am                  **Arrive at Airlie**  
6809 Airlie Road  
Warrenton, VA 20187

10:15-10:30am        **Check-In and Registration**

10:30am- 12:00pm    **Welcome & Debt Overview**

**Speakers:** Betsy Prueter, Postsecondary National Policy Institute (PNPI); MaryEllen McGuire, PNPI; and Jinann Bitar, The Education Trust

*This session will provide an overview of federal student loan debt, including how much students and families are borrowing to attend college; the types of institutions borrowers are attending; and how borrowing and debt patterns vary across income and demographics.*

12:00-1:00pm        **Lunch with Experts**

*Lunch will provide an opportunity for staff to ask the day's panelists additional questions in a smaller group setting.*

**1:00pm-2:30pm Delinquency & Default Overview**

**Speakers:** *Regan Fitzgerald, Pew Charitable Trusts and Victoria Jackson, The Education Trust*

*This session will provide an overview of delinquency and default, including how borrowers enter delinquency and/or default; how deferments and forbearances work; trends in delinquency and default rates over time; and how borrower demographics impact the likelihood of default.*

**2:30-2:45pm Break****2:45-4:15pm Borrower Perspectives on Debt & Default**

**Speakers:** *Tia Caldwell, New America and Melissa Emrey Arras, The Government Accountability Office (GAO)*

*This session will examine students' perceptions of financing a college education including the gaps between what students identify as "reasonable" debt and what they deem as "expected" debt. It will also review how students and borrowers view their own debt balances and default experiences.*

**4:15-4:30pm Break****4:30- 5:00pm Closing Discussion**

**Speaker:** *Betsy Prueter, PNPI and MaryEllen McGuire, PNPI*

*In this session, participants will review the day's programming and share any additional questions they have on debt, delinquency, and default.*

**5:00-6:00pm Break****6:00-7:00pm Working Dinner**

**Facilitator:** *Betsy Prueter, PNPI and MaryEllen McGuire, PNPI*

*Dinner will provide an opportunity for staff to ask expert panelists additional questions in a smaller group setting. In addition, PNPI staff will provide a preview of the second day of programming.*

**Wednesday, April 12**

8:30-9:00am            **Breakfast**

9:00-10:15am        **Welcome & Overview of Repayment Plans**

**Speakers:** *Betsy Prueter, PNPI; MaryEllen McGuire, PNPI; James Bergeron, National Council of Higher Education Resources (NCHER); and Lexi West, Pew Charitable Trusts*

*This session will provide an overview of all federal repayment plans, the frequency with which the various plans are used, and the advantages and disadvantages of the current system.*

10:15-10:30am       **Break**

10:30-11:15am       **Overview of Public Service Loan Forgiveness Program (PSLF)**

**Speaker:** *Lexi West, Pew Charitable Trusts*

*This session will provide an in-depth overview on PSLF.*

11:15-11:30am       **Break**

11:30am-12:30pm    **Repayment Simulation**

**Speaker:** *Lexi West, Pew Charitable Trusts*

*This session will allow participants to learn more about the strengths and challenges of repayment plans by applying the plans to a borrower profile.*

12:30-1:30pm        **Lunch with Experts**

*Lunch will provide an opportunity for staff to ask the day's panelists additional questions in a smaller group setting.*

1:30-2:45pm         **The Cost of Federal Student Loan & Repayment Programs**

**Speakers:** *Noah Mann, Office of Management & Budget and Katherine Sydor, Office of Management & Budget*

*This session will examine the cost of the federal student loan and repayment programs and the major drivers of costs and savings each year.*

2:45-3:00pm         **Break**

3:00- 4:15pm            **Roundtable Discussion: Current Issues in Debt & Repayment**

**Speakers:** *Preston Cooper, Foundation for Research on Equal Opportunity; Jason Delisle, The Urban Institute; and Sarah Sattelmeyer, New America*

*This session will allow participants to ask any remaining questions of our experts regarding debt and/or repayment.*

4:15-4:20pm            **Break**

4:20-5:00pm            **Closing Discussion**

**Speaker:** *Betsy Prueter, PNPI and MaryEllen McGuire, PNPI*

*In this session, participants will review the day's programming, share what they have learned over the two days, consider how they might apply what they learned, and share any additional questions they have on debt and repayment.*

5:00pm                  **Depart Airlie**

6:15pm                  **Arrive at Peace Circle, Washington, D.C.**



**Federal Student Loan Debt & Repayment  
Seminar  
April 11-12, 2023  
Warrenton, Virginia**

**Tuesday, April 11**

8:45am                   **Staff arrive to board shuttle**  
Peace Circle  
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*This session will allow participants to ask any remaining questions of our experts regarding debt and/or repayment.*

4:15-4:20pm            **Break**

4:20-5:00pm            **Closing Discussion**

**Speaker:** *Betsy Prueter, PNPI and MaryEllen McGuire, PNPI*

*In this session, participants will review the day's programming, share what they have learned over the two days, consider how they might apply what they learned, and share any additional questions they have on debt and repayment.*

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